

# Join us for a Special TPA Online Event April 29, 2021

Courtesy of



## “Prospecting a New Market Opportunity: Generating Sales in the Tax Exempt Marketplace

**11:00 a.m. – 12:15 p.m. EDT**

**★1.5 hours of Fi360 CE Credit (AIF Designation)  
★1.5 hours NAPA CE Credit**



TPAbenchmark.com is a service of Hynes Associates, focused on helping connect Retirement Plan Advisors, Providers and TPAs to write *MORE* business together.

### Agenda:

- ▶ **Best Practices for Prospecting Tax-Exempt Plan Sales: Sales Ideas from the Pro's**
- ▶ **Plan-Design Strategies for Implementing a Successful Tax-Exempt Plan**
- ▶ **Case Study on Achieving Success in the Tax-Exempt Space**

**We're planning plenty of time for interaction and Q&A at this event,  
so be sure to register today!**

### Your Hosts and Facilitators:



#### **Dawn Hynes, Hynes Associates and TPAbenchmark.com**

Prior to establishing Hynes Associates, Dawn was Vice President and head of the Small-to-Mid Market Retirement Plan Business (with P&L responsibility) for the MetLife Defined Contribution Group. She started the company's business in the under-\$30 million retirement plan marketplace, and built it from the ground-up. Dawn started Hynes Associates 15 years ago to help Retirement Plan Providers, Advisors and TPAs grow their sales in the retirement plan marketplace.



#### **Matthew Asher, Business Development Director, OneAmerica**

Matthew is one of three business development directors at OneAmerica, working with Third-Party Administrators and Broker-Dealers. He is experienced in leading teams in growing and developing business and customer relationships in order to share sales ideas, product knowledge, and other relationship-building insight driven around 401(k), 403(b), and 457 retirement plans. Matthew will co-facilitate this session, and we look forward to introducing the TPA Owners in attendance to the entire OneAmerica Team.

**Space is limited, so RSVP quickly to [dawn@hynesassociates.com](mailto:dawn@hynesassociates.com)**